

MANAGER, ASSESSOR EXEMPTIONS

DEFINITION:

To plan, implement, and manage the operations of the Exemptions Division in the Assessor/Recorder/County Clerk's Office; and to perform related work as required.

DISTINGUISHING CHARACTERISTICS:

Manager, Assessor Exemptions serves as head of the Exemptions Division in the Assessor/Recorder/County Clerk's Office. Under the administrative direction of the Chief Deputy Assessor, this one-position class is the lead manager with responsibilities for determining property tax exemptions for qualified organizations and individuals, developing and implementing operating policies and procedures, and planning and coordinating the work of the Exemptions Division.

EXAMPLES OF DUTIES:

Plans, directs, coordinates and reviews the work activities of the Exemptions Division; coordinates work with other divisions, departments, counties, and agencies including the Realty and Business Division, County Counsel and the State Board of Equalization regarding complex valuation matters; values less complex properties through the review of property transfers, new construction/remodeling and cuts; solves complex operational problems including automation issues; reviews the work of subordinates; supervises training of new employees in the Exemptions Division; reviews and analyzes master property records reports; reviews and approves reports and correspondences in response to taxpayer inquiries; reviews and implements legislative proposals and changes to the California Revenue & Taxation Codes pertaining to the Exemptions Division and the appraisal of Real and Business Property; performs the most difficult field inspections related to exemptions; interviews and counsels claimants; investigates complaints; directs continuing investigative studies to determine claimant's exemption eligibility; represents the Assessor at Appeals Board Hearings and in matters of exemptions among the public, local and state governments.

MINIMUM QUALIFICATIONS:

Knowledge of:

- Property tax laws of California and the State Board of Equalization.
- Real and business personal property appraisal procedures and practices.
- Court cases, legal opinions affecting exemption procedures, the assessment of property, Assessor's Handbook, real estate recording law or non-judicial county clerk functions.
- The functions of other divisions and departments associated with property tax and real estate programs.
- Management and supervision principles.
- Budget and record keeping procedures.
- Principles of management and administration goals, policies, and procedures of the Assessor/Recorder/County Clerk's Office.
- Revenue and Taxation Code, Government, Civil, Health and Safety Codes pertaining to Assessor/Recorder/County Clerk functions.

- Computer systems and application techniques as they relate to the Assessor/Recorder/County Clerk.
- General Management System in principle and in practice.

Skills and Ability to:

- Plan, organize and supervise the work activities of a division to include training programs.
- Advise executive management on operational projects and activities.
- Recognize, define, and resolve organizational problems.
- Read and interpret complex technical documents and publications.
- Value less complex real property.
- Communicate effectively both orally and in writing.
- Research and analyze complex statistical information, policies and procedures.
- Prepare written reports with recommendations and justifications.
- Develop and implement procedure manuals, policy bulletins and technical forms.
- Implement and monitor data collection systems.
- Prepare and monitor the annual budget for a division.
- Effectively represent department and maintain productive liaison with elected officials, other governmental agencies and the general public.
- Exercise tact and diplomacy.

EDUCATION/EXPERIENCE:

Education, training, and/or experience, which demonstrate possession of the knowledge and skills, listed above. Examples of such education/experience combinations are: the possession of a bachelor's degree from an accredited college or university in business administration, public administration, real estate, economics or a closely related field, AND:

1. Five (5) years of full-time experience in property tax, four (4) of which should be directly related to property exemptions; OR,
2. Four (4) years of experience as a second line supervisor responsible for a section in a California County assessor, recorder, county clerk, treasurer or tax collector's office.

SPECIAL NOTES, LICENSES, OR REQUIREMENTS:

Notes:

Additional years of experience as described above may substitute for the education requirement on a year-for-year basis; OR, completion of appropriate course work from an accredited college or university may substitute for the experience requirement on a year-for-year basis.

License:

A valid California Class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment or the ability to arrange necessary transportation for field travel. Employees in this class may be required to use their personal vehicle.

Certification:

A permanent Appraiser's Certificate issued by the California State Board of Equalization is required.

Probationary Period:

Incumbents appointed to permanent positions in this class shall serve a probationary period of twelve (12) months (Civil Service Rule 4.2.5).